



Bishoff + Associates, PLLC

Certified Public Accountants

New Business Client Set Up Form

Company Name _____

Contact Person _____ Title _____

Address _____

City _____ State _____ Zip _____

Work Phone _____ Cell Phone _____

Email _____

Preferred Method of Contact _____

Entity Type _____

FEIN _____ Fiscal Year End _____

Date of Incorporation _____ Sales Tax # _____

What software do you use for your accounting? _____

What software/service do you use for your payroll? _____

Referred by _____

Additional Services You Are Interested In

Accounting	Audits	Back Office Services	Bookkeeping	Compilations	SalesTax
Payroll	Payroll Tax	Reviews	Quickbooks Coaching	Tax Prep	W2/W3/1099

Internal Office Use

Notes _____

To Do's _____

Calls _____

Schedule _____

Project(s) _____

Account Manager _____